


GROWTH AND
OPPORTUNITY



2019

MECKLENBURG COUNTY COMMUNITY
PULSE REPORT



just under
1,100,000
residents

Mecklenburg County has the largest population of any county in the State of North Carolina. The County includes the City of Charlotte; towns of Cornelius, Davidson, and Huntersville (north of Charlotte); and the towns of Matthews, Mint Hill, and Pineville (south and southeast of Charlotte). Mecklenburg County is home to just under 1,100,000 residents, making it the most populous county between Atlanta, Georgia and Washington, D.C. In fact, from 2007 to 2017, Mecklenburg County's population growth rate was 24 percent.

Over the last decade, Mecklenburg County has attracted a large and growing number of people from around the country and the world. As a major hub for American Airlines – one of the country's largest airlines – it is easy to get to Mecklenburg County. This access, in part, has helped attract several Fortune 500 and 1000 companies that bring millions of investment dollars into the local economy. In November 2018, Honeywell (a Fortune 100 Company) announced it would move its global corporate headquarters to Charlotte, NC with an estimated 750 jobs by end of 2024. This announcement is a huge win for the Charlotte region.

Moreover, with a world-renowned park and recreation system, a range of professional sports teams and diverse communities, people who come to Mecklenburg County find an energized downtown (a.k.a. Uptown) and a variety of living options that make the County a great place to LIVE, LEARN, WORK and RECREATE.

How the County's and region's growth has changed the economic and social landscape over the years & the need for the community to understand what might be the impact on County services.

OVERVIEW



National Growth



Local Growth



Social Factors



Summary

The U.S. economy is currently experiencing the second longest period of economic expansion in its history. While population growth rates have not recovered to levels experienced prior to the Great Recession, many urban areas across the country have continued to see population increases. Mecklenburg County has been strong in this period of economic expansion, with a growing population and a diversifying economic base, putting the County in an excellent position to do well over the next several decades.



NATIONAL GROWTH

Population
Economic

population growth

focused on urban areas

nationwide

Population growth has slowed and continued to be low since the Great Recession.

However, growth is still occurring in specific areas and is focused in cities and urban areas.

north carolina

53% of North Carolina's population growth in the first half of this decade occurred in Mecklenburg, Wake and Durham counties. Those three counties accounted for 40% of state growth from 2016-2017.

Most recent population estimates show a broadening of state population growth to include more suburban areas and counties attractive to retirees on the coast and in the mountains.

economic growth

sixteenth in US

economic growth

widespread across metro areas

Among the 100 largest metros in 2016

96

added jobs

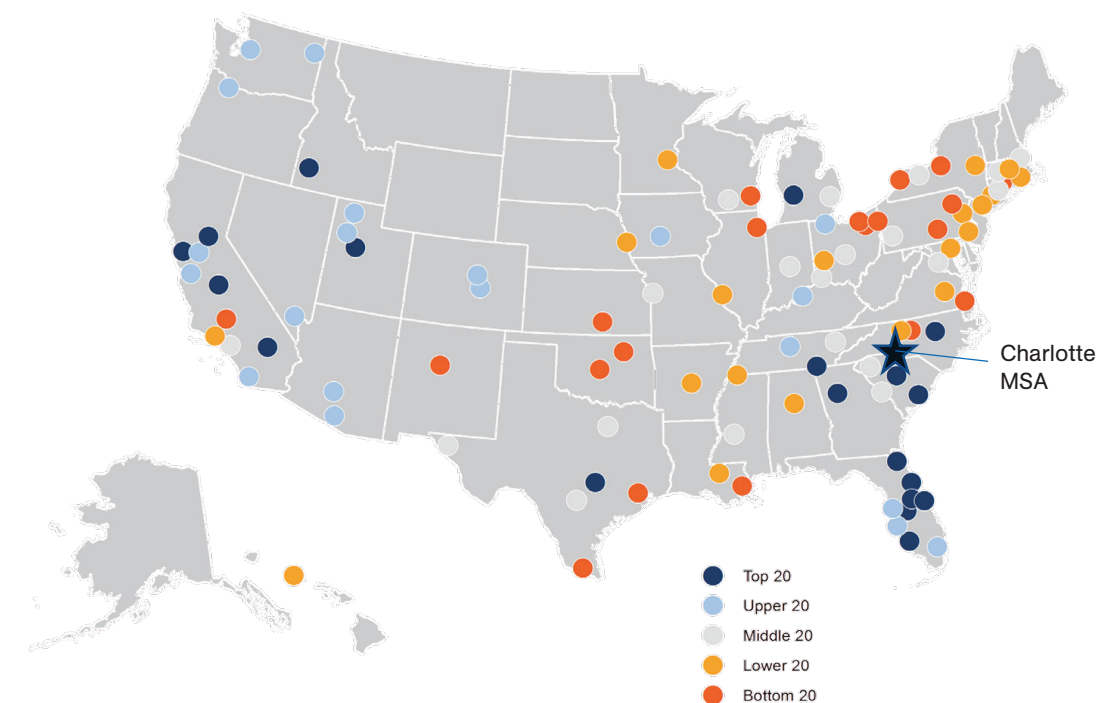
93

posted an increase
in regional
economic output

85

saw an increase in
number of jobs in
young firms

The Charlotte MSA is ranked 16th nationally in growth from 2015-2016 among 100 largest metro areas



Composite growth rankings
among the 100 largest US
metropolitan areas

2015-2016

Sources: Brookings analysis of Moody's Analytics estimates and U.S. Census Bureau's Longitudinal Employer Household Dynamics program statistics



LOCAL GROWTH

Population
Businesses
Employment + Jobs
Education
Income
Living Wage

population growth

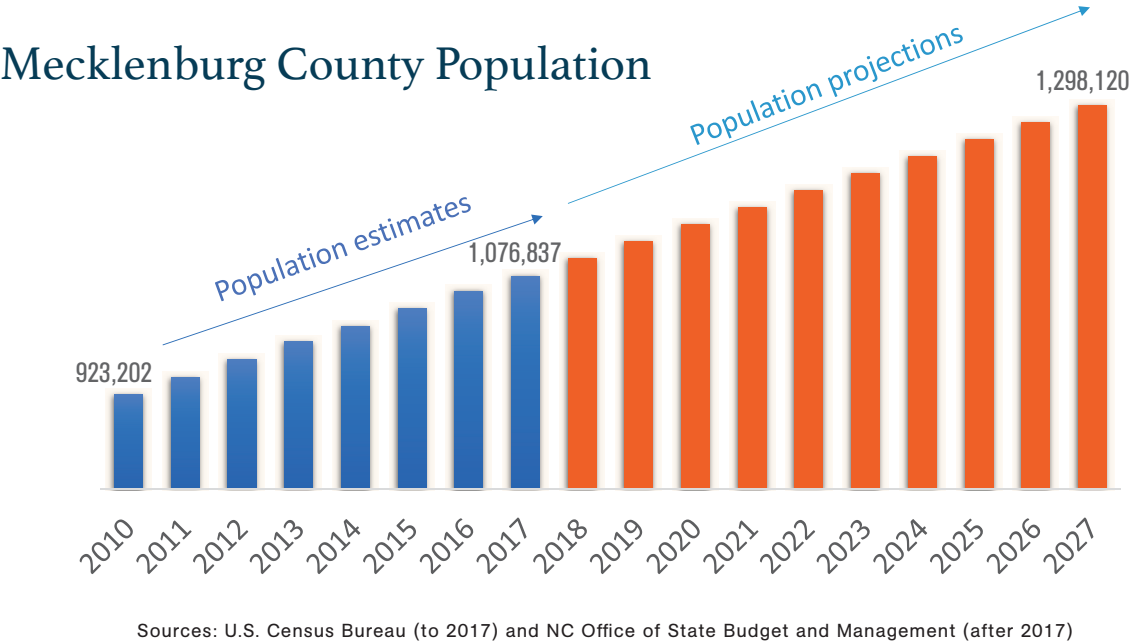
sustained

Even during the last Great Recession, Mecklenburg County never stopped experiencing population growth, and economic performance remained relatively strong. In fact, the local metro economy has been among the top five U.S. metro-politan areas since 2004 in overall growth in jobs, output and aggregate wages, despite the last recession. Rising wages contribute to this positive economic picture which has shown few weaknesses as the recovery period has progressed. This dynamic economy is driving demand for skilled workers.

One of the strengths of the Charlotte Metropolitan Statistical Area (MSA) is the relatively low cost of living combined with annual average salaries of approximately \$66k (est. in Q3 2018). In Q3 2018, the County’s cost of living for goods and services as determined by the Cost of Living Index was 99.0, which was one point lower than the U.S. result of 100. However, over the last two years, the cost of living in Mecklenburg County has increased. In Q2 2016, the annual average salary was \$63k, and the County’s Cost of Living Index result was 97.9.

To support continued growth and prosperity, it is important that a community provide both a quality education to residents and an adequate education infrastructure beyond high school which encourages high school students to attend universities. When it comes to providing a quality education, the four-year cohort high school graduation rate of Charlotte-Mecklenburg Schools (CMS) is high and increasing. There is also a closing gap in high school graduation rates among race/ethnic groups.

Unfortunately, while the County is at the heart of a strong, rapidly growing metro economy, its growth has not always been inclusive. The challenge for the community is to build on its impressive strengths and bring opportunity for those who move to and currently reside in Mecklenburg County. Mecklenburg County Government’s focus on people puts it at the center of these challenges and makes it a champion for all who live in the County and a force for keeping the area attractive and growing.



40th largest population in the nation (2017)

2010-2017 population net increase of 153,635

2017-2027 population projections adding net increase of 221,283 residents

National Benchmark (County)

Between 2010 and 2017, Mecklenburg County was the ninth fastest growing large county in the U.S.

Rank	County	2010	2017	Change 2010-2017	% change 2010-2017
1	Fort Bend County (Richmond), TX	590,286	764,828	174,542	29.6%
2	Denton County (Denton), TX	666,750	836,210	169,460	25.4%
3	Collin County (McKinney), TX	788,442	969,603	181,161	23.0%
4	Lee County (Fort Myers), FL	620,467	739,224	118,757	19.1%
5	Travis County (Austin), TX	1,030,522	1,226,698	196,176	19.0%
6	Wake County (Raleigh), NC	906,884	1,072,203	165,319	18.2%
7	Orange County (Orlando), FL	1,148,696	1,348,975	200,279	17.4%
8	Denver County (Denver), CO	603,218	704,621	101,403	16.8%
9	Mecklenburg County (Charlotte), NC	923,202	1,076,837	153,635	16.6%
10	Utah County (Provo), UT	519,975	606,425	86,450	16.6%
11	District of Columbia	605,040	693,972	88,932	14.7%
12	Hillsborough County (Tampa), FL	1,233,557	1,408,566	175,009	14.2%
13	Gwinnett County (Lawrenceville), GA	808,254	920,260	112,006	13.9%
14	Polk County (Lakeland), Florida	603,135	686,483	83,348	13.8%
15	Bexar County (San Antonio), TX	1,722,797	1,958,578	235,781	13.7%
16	Harris County (Houston), TX	4,107,854	4,652,980	545,126	13.3%
17	Tarrant County (Fort Worth), TX	1,817,417	2,054,475	237,058	13.0%
18	King County (Seattle), WA	1,937,378	2,188,649	251,271	13.0%
19	Clark County (Las Vegas), NV	1,952,906	2,204,079	251,173	12.9%
20	Maricopa County (Phoenix), Arizona	3,824,644	4,307,033	482,389	12.6%

Source: U.S. Census, Population estimates July 1, 2010 and July 1, 2017, filtered for counties with 2010 population of 500K or more.

population growth

national benchmark (city)

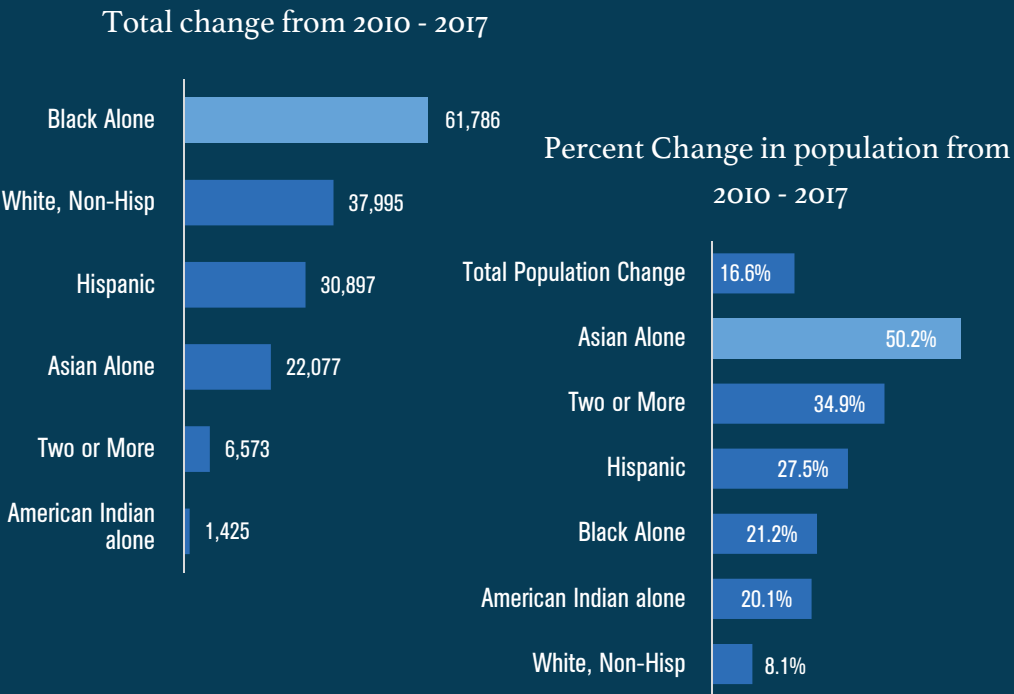
Rank	Municipality	2010	2017	Change 2010 - 2017	% change 2010 - 2017
1	Seattle, Washington	610,333	724,745	114,412	18.7%
2	Austin, Texas	806,463	950,715	144,252	17.9%
3	Denver, Colorado	603,218	704,621	101,403	16.8%
4	Fort Worth, Texas	748,569	874,168	125,599	16.8%
5	Charlotte, North Carolina	738,500	859,035	120,535	16.3%
6	Washington, District of Columbia	605,040	693,972	88,932	14.7%
7	San Antonio, Texas	1,333,413	1,511,946	178,533	13.4%
8	Phoenix, Arizona	1,449,039	1,626,078	177,039	12.2%
9	Dallas, Texas	1,200,468	1,341,075	140,607	11.7%
10	Columbus, Ohio	790,812	879,170	88,358	11.2%
11	Portland, Oregon	585,340	647,805	62,465	10.7%
12	Oklahoma City, Oklahoma	582,253	643,648	61,395	10.5%
13	Nashville - Davidson metro govt, Tennessee	604,799	667,560	62,761	10.4%
14	Boston, Massachusetts	620,702	685,094	64,392	10.4%
15	Houston, Texas	2,099,256	2,312,717	213,461	10.2%
16	San Francisco, California	805,770	884,363	78,593	9.8%
17	Las Vegas, Nevada	584,752	641,676	56,924	9.7%
18	San Diego, California	1,306,176	1,419,516	113,340	8.7%
19	San Jose, California	955,255	1,035,317	80,062	8.4%
20	Jacksonville, Florida	823,175	892,062	68,887	8.4%

Source: U.S. Census, Population estimates July 1, 2010 and July 1, 2017, filtered for cities with 2010 population of 500K or more.

Population Changes (Mecklenburg County)

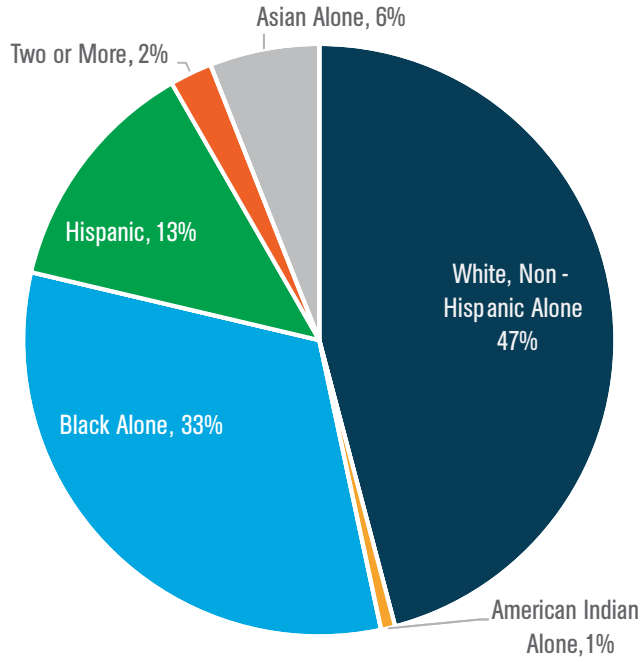
Between 2010 and 2017, the net increase in Mecklenburg’s population was approximately 150,000 individuals. The largest increase was seen with the Black population.

The number of Asians increased at the fastest rate, followed by the multi-racial group.



Source: Census Bureau Annual County Resident Population Estimates by Age, Sex, Race and Hispanic Prgin: April 1, 2010 to July 1, 2017

Mecklenburg Approximate Racial/Ethnic Percentages, 2017



Note: This chart breaks out Hispanic and White, Non-Hispanic, populations so it adds up to slightly more than 100 percent. The percentages should be treated as an approximation of population by race and ethnicity.

Sources: Census Bureau Annual County Resident Population Estimates by Age, Sex, Race & Hispanic Origin: April 1, 2010 to July 1, 2017 and 2015 Pulse Report

population

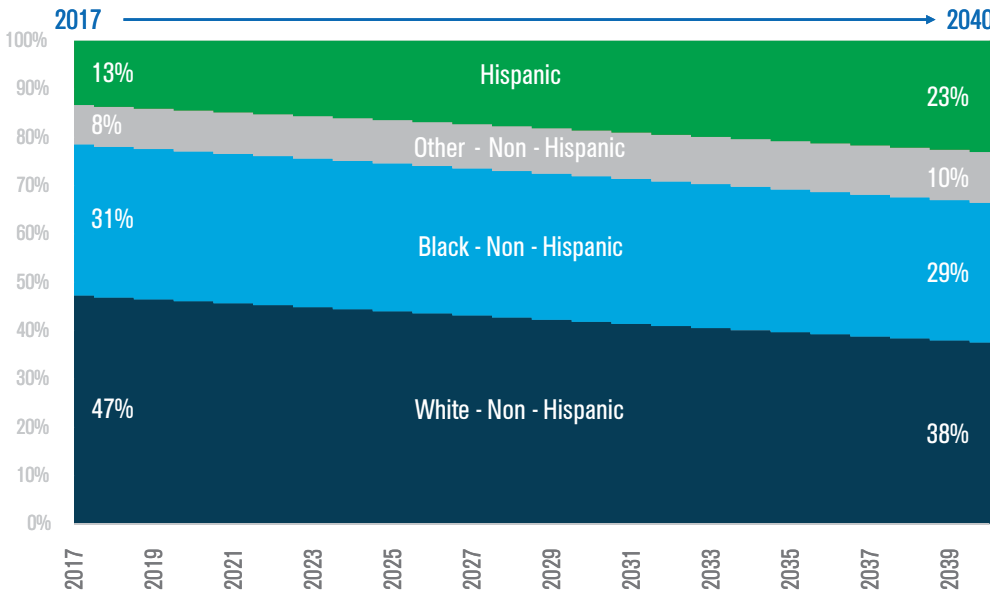
race/ethnicity in mecklenburg

Percent Hispanic population in Mecklenburg has been relatively stable in recent years, with the Asian and Black populations’ percentages up slightly.

Population that identify as being of two or more races now accounts for a noticeable share of the population.

Population: Race/Ethnicity Projections in Mecklenburg County

2017 - 2040 population projections indicate an increasing percentage of Hispanic individuals will be living in Mecklenburg County, while the percentage of White, Non-Hispanic will decline.



Source: REMI forecast

businesses

small, minority and women owned businesses in Mecklenburg County

Mecklenburg County uses certifications from the State of North Carolina's Office for Historically Underutilized Businesses (HUB) to understand the number of minority and women owned businesses in the county.

The City of Charlotte provides an independent certification of Small Business status.

The County's Minority and Women Owned Small Business Enterprise (MWSBE) program leads outreach, training and partnership building efforts to MWSBEs.

As of December 2018:

Approximately **760 businesses** in Mecklenburg County were certified as either **minority or women owned enterprises** according to data from the North Carolina HUB office.

employment + jobs

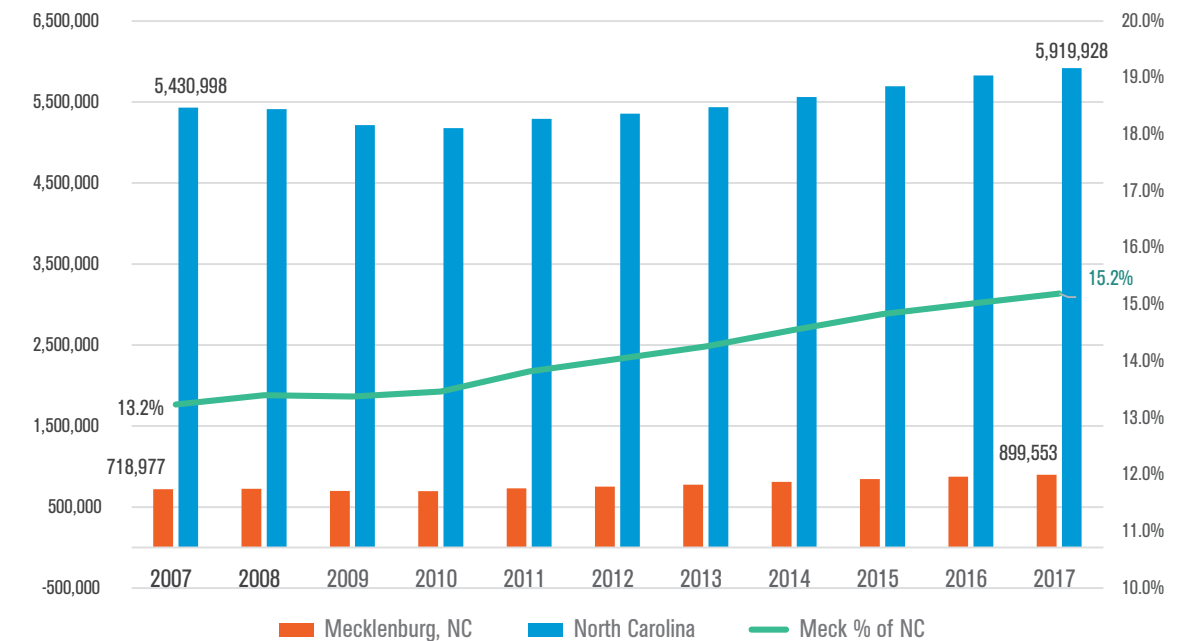
NC & Mecklenburg County

From 2007 to 2017 the total number of jobs increased by:

5.6% Nationally
9% in North Carolina
25% in Mecklenburg

Mecklenburg County's share of total state employment grew from 13.2% in 2007 to 15.2% in 2017.

Total Employment for NC and Mecklenburg Percent of NC Jobs in Mecklenburg (line)



Source: Bureau of Economic Analysis

employment + jobs

change in Mecklenburg

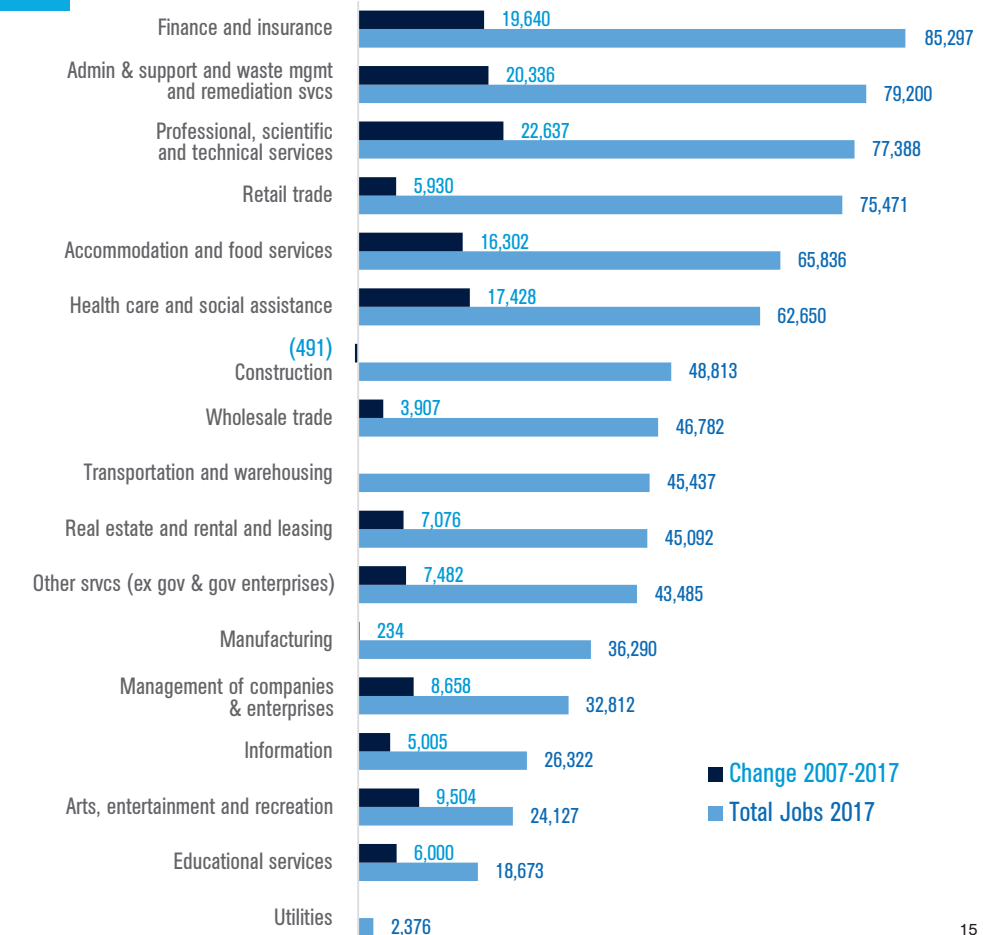
From 2007 to 2017 Mecklenburg saw the largest numeric increase in jobs in the "Professional, scientific and technical services" category.

The arts, entertainment and recreation category increased at an annual rate of 5.1% over the period (fastest of the larger categories).

The Chart (right) shows: Mecklenburg County Total Full-Time and Part-Time Employment by North American Industry Classification System (Private non-farm employment).

Note: Change not available for Utilities or Transportation and Warehousing.

Source: Bureau of Economic Analysis

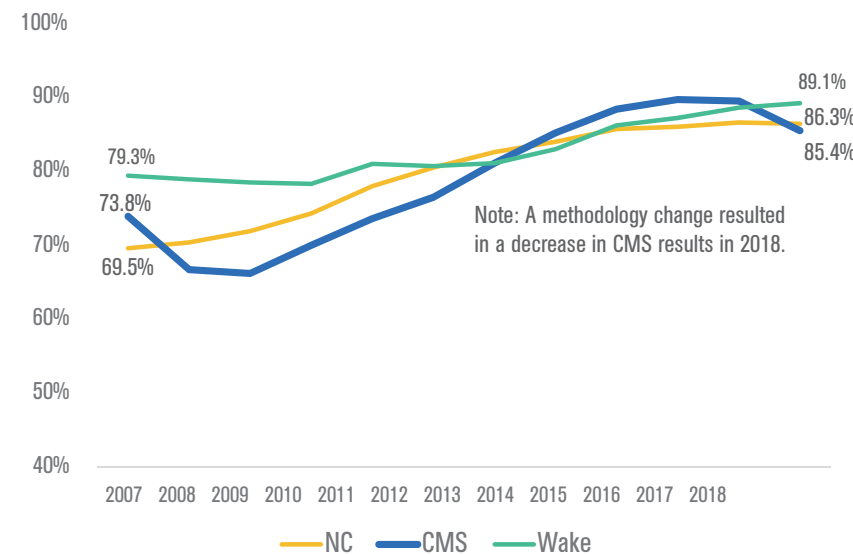


education

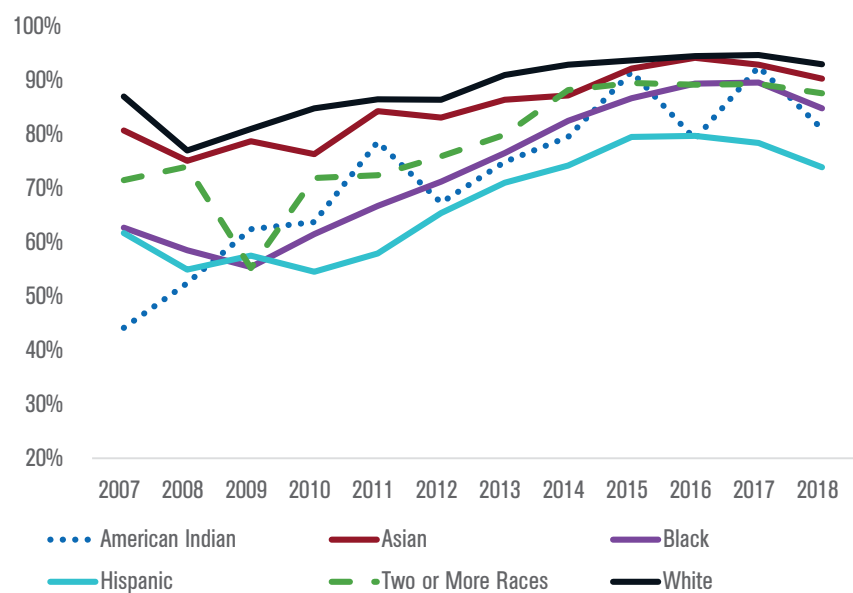
CMS Four-Year Cohort Graduation Rates

Between 2007 and 2017, Mecklenburg County's four-year cohort graduation rate went from 73.8% to 85.4%. Disparity amongst various demographic groups declined during that time as well.

CMS Four-Year Cohort Graduation Rate by Graduation Year



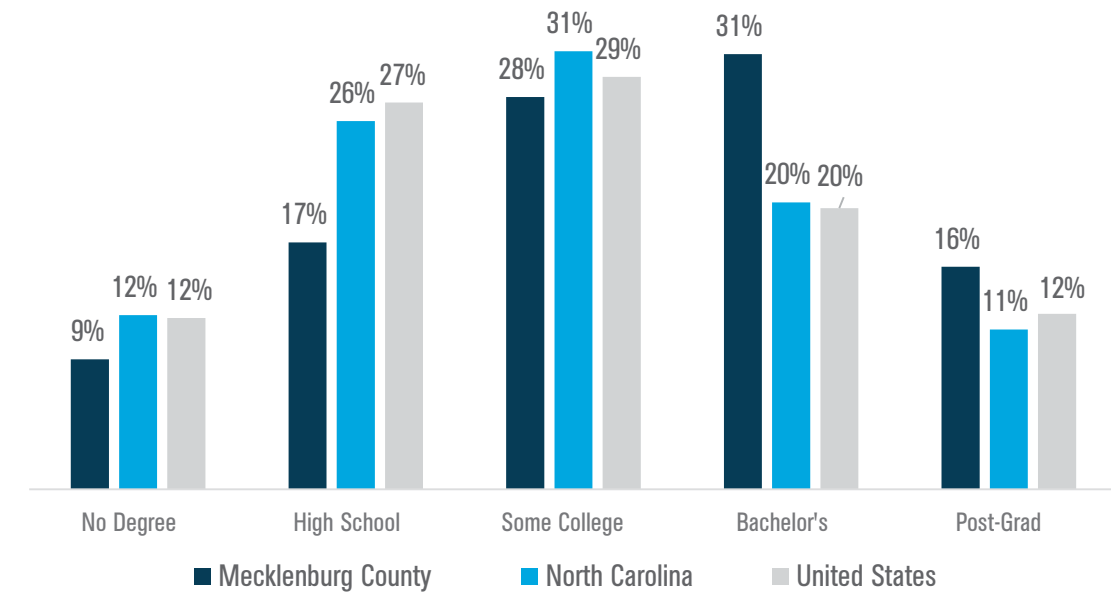
CMS Four-Year Cohort Graduation Rate by Ethnicity



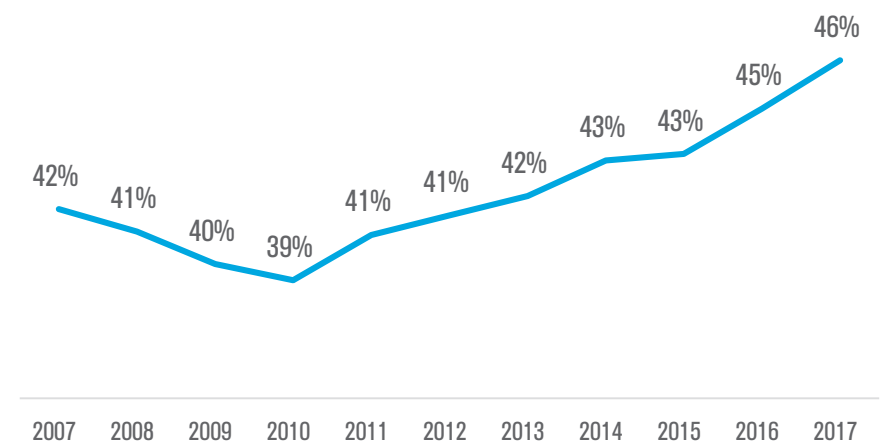
Source: NC Department of Public Instruction

Between 2007 and 2017, Mecklenburg County's population age 25 or greater with a bachelor's degree or higher increased from 42% to 46% of the population, making Mecklenburg's residents more educated than the state or U.S. overall.

2017 Educational Attainment Comparison



Mecklenburg County: Population with Bachelor's Degree or Higher



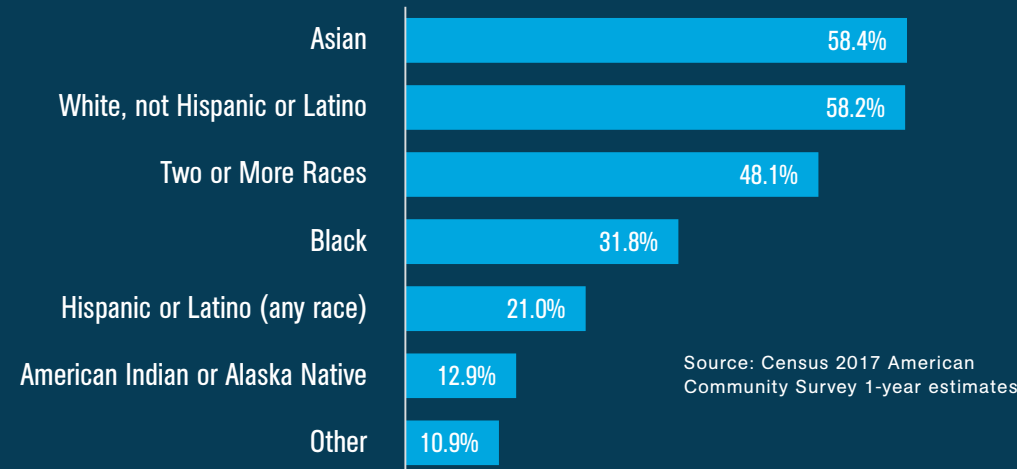
Sources: <http://censusreporter.org> - based on Census 2017 1-year estimates.
U.S. Census 2017 American Community Survey 2017 1-year estimates.

education

Among different racial and ethnic groups, the percent with a college degree varies widely.

demographic groups

Mecklenburg Population 25+ with a Bachelor's Degree, 2017



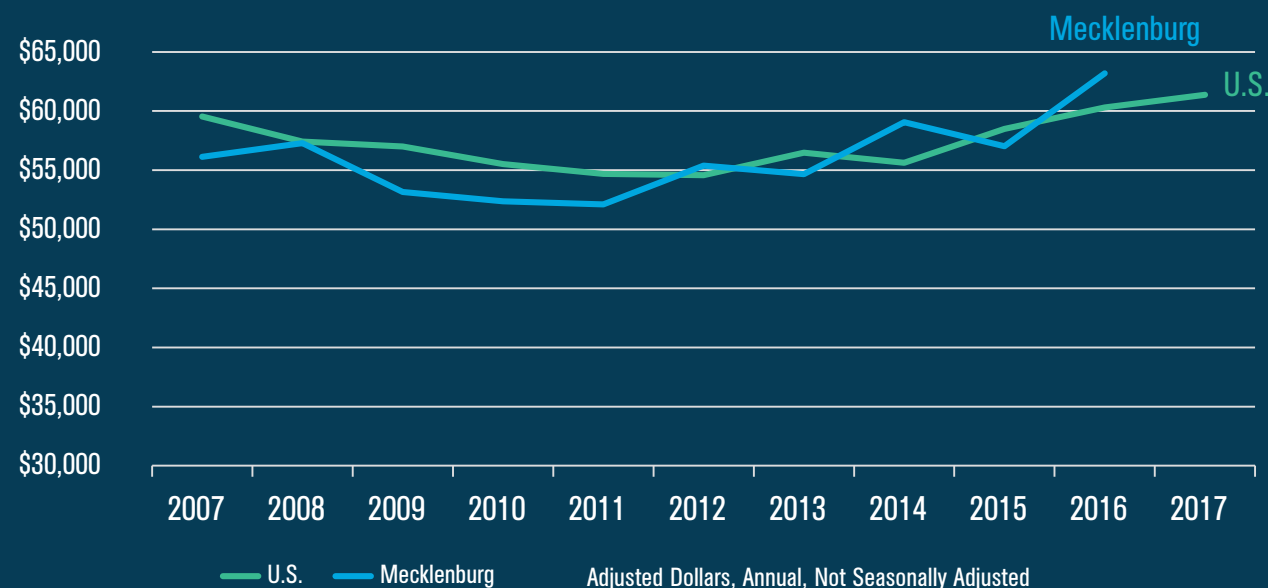
Source: Census 2017 American Community Survey 1-year estimates

income

household changes nationally & locally

Real Median Income U.S. & Mecklenburg County

Mecklenburg County's median household income dropped below the U.S. after the recession, but the median income has gained ground in recent years.



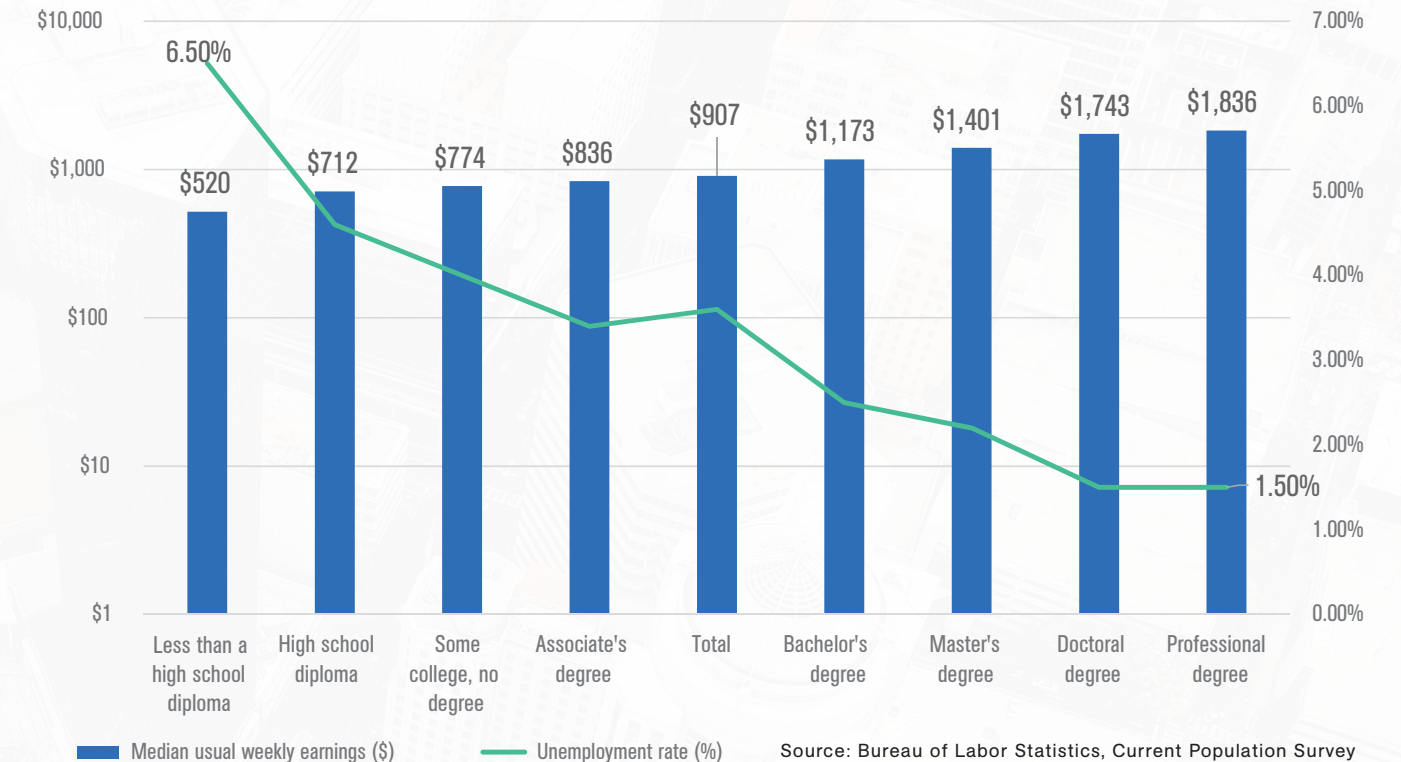
Source: Federal Reserve Economic Data, Federal Reserve Bank of St. Louis.

education + income : U.S.

unemployment, earnings by educational attainment

US-2017 Unemployment Rates and Earnings by Educational Attainment

Nationally, higher levels of education correlate with much lower rates of unemployment & higher earnings.



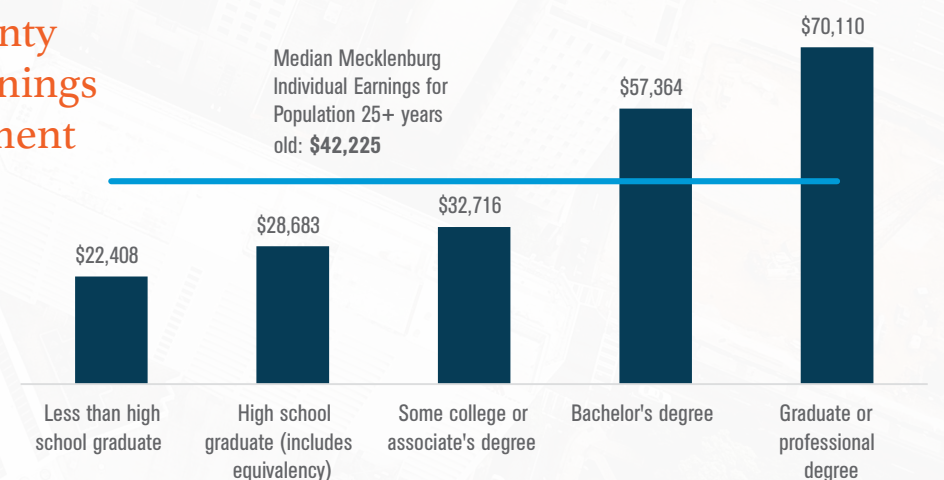
education + income : Mecklenburg

individual earnings by educational attainment

2017 Mecklenburg County Median Individual Earnings by Educational Attainment

Earnings range widely by educational attainment in Mecklenburg.

Note: Differences in earnings by education are only available at the individual level (not household)



Source: Census 2017 American Community Survey 1-year estimates

living wage

comparisons in Mecklenburg County, NC

Hourly Wages	1 Adult	1 Adult 1 Child	1 Adult 2 Children	2 Adults (1 Working)	2 Adults (1 Working) 1 Child	2 Adults (1 Working) 2 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children
Living Wage	\$11.78	\$24.13	\$27.54	\$19.21	\$21.94	\$24.94	\$9.61	\$12.93	\$15.33
Poverty Wage	\$5.80	\$7.81	\$9.82	\$7.81	\$9.82	\$11.83	\$3.90	\$4.91	\$5.91
Minimum Wage	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25	\$7.25

The living wage for a single parent with one child in Mecklenburg County is \$24.13. This amounts to \$50,190 annually, based on 2,080 hours.

36% of children in Mecklenburg County live in Single-Parent Households*

living wage

calculation methodology for Mecklenburg County, NC

Annual Expenses	1 Adult	1 Adult 1 Child	1 Adult 2 Children	2 Adults (1 Working)	2 Adults (1 Working) 1 Child	2 Adults (1 Working) 2 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children
Food	\$2,986	\$4,394	\$6,613	\$5,474	\$6,807	\$8,786	\$5,474	\$6,807	\$8,786
Child Care	\$0	\$6,804	\$9,915	\$0	\$0	\$0	\$0	\$6,804	\$9,915
Medical	\$2,195	\$6,831	\$6,550	\$5,501	\$6,550	\$6,607	\$5,501	\$6,550	\$6,607
Housing	\$8,436	\$10,884	\$10,884	\$9,408	\$10,884	\$10,884	\$9,408	\$10,884	\$10,884
Transportation	\$4,236	\$8,754	\$9,189	\$8,754	\$9,189	\$11,032	\$8,754	\$9,189	\$11,032
Other	\$2,656	\$4,294	\$4,736	\$4,294	\$4,736	\$6,059	\$4,294	\$4,736	\$6,059
Required annual income after taxes	\$20,508	\$41,961	\$47,887	\$33,431	\$38,166	\$43,368	\$33,431	\$44,970	\$53,283
Annual taxes	\$3,996	\$8,232	\$9,403	\$6,533	\$7,477	\$8,505	\$6,533	\$8,825	\$10,469
Required annual income before taxes	\$24,504	\$50,192	\$57,291	\$39,964	\$45,643	\$51,873	\$39,964	\$53,795	\$63,752

Massachusetts Institute of Technology (MIT) uses this matrix of expenses to calculate living wage. This table is for Mecklenburg County.

Sources: <http://livingwage.mit.edu/>
*Robert Wood Johnson Foundation, 2018 County Health Rankings & Roadmap



As of January 2019, 30 states have laws mandating higher pay than the \$7.25 federal minimum wage, which has not changed since 2009.

- In 2017, 19 states began the year with wage increases — five states did so based on ballot measures and seven states raised pay based on legislation passed in prior sessions.
- In 2018 and 2019, workers in 20 states saw additional increases in the minimum wage.
- By 2022, 17% of Americans will live in a state with a \$15 minimum wage.

Source: <http://fortune.com/2017/12/20/minimum-wage-jan-2018/> and www.laborlawcenter.com/state-minimum-wage-rates/



SOCIAL FACTORS

Cost of Living
Quality of Life

cost of living

U.S., NC and Mecklenburg County

2018 Q3	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Mecklenburg County, North Carolina	\$66,225	99.0	\$66,904
North Carolina	\$49,322	91.9	\$53,673
USA	\$55,994	100.0	\$55,994

2016 Q2	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
Mecklenburg County, North Carolina	\$63,751	97.9	\$65,102
North Carolina	\$47,625	96.3	\$49,455
USA	\$54,152	100.0	\$54,152

The Cost of Living Index (COLI) estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power.

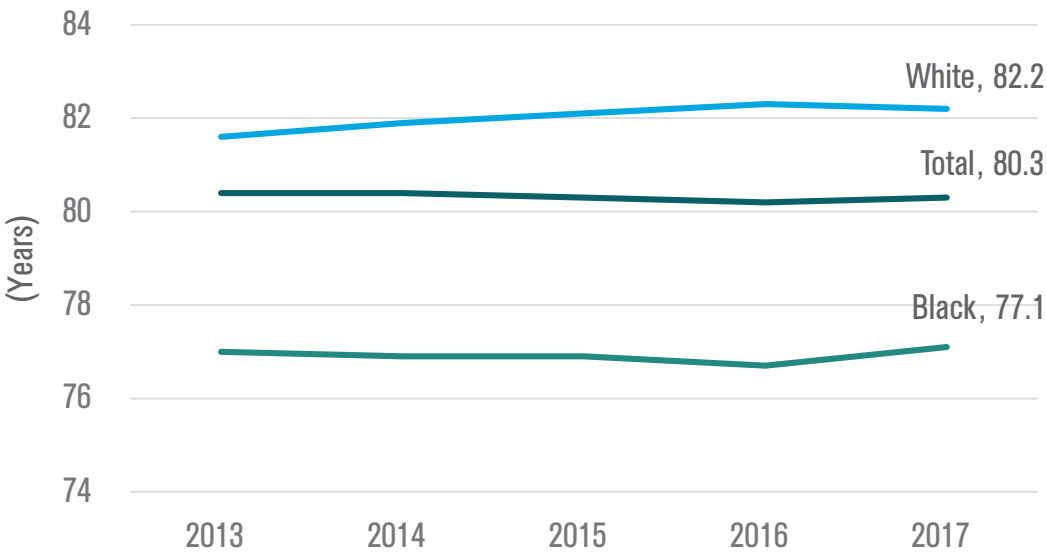
In 2018, the cost of living was one point lower in Mecklenburg County, NC than the U.S. average; whereas in 2016 the cost of living was approximately two points lower.

Sources: JobsEQ® Q2 2016 + JobsEQ® Q3 2018; developed by Chmura Economics & Analytics

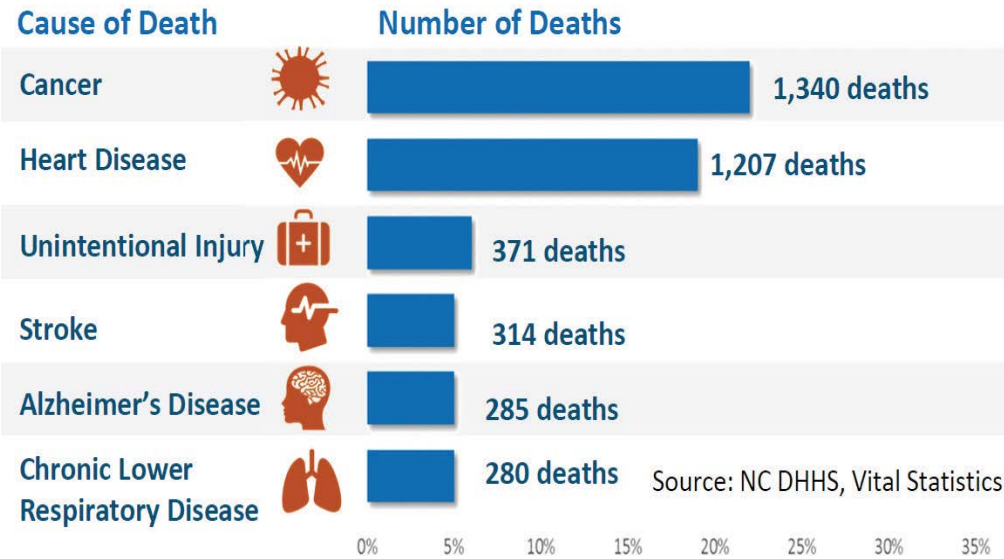
quality of life

expectancy & leading causes of death

Life Expectancy in Mecklenburg County



Leading Causes of Death in Mecklenburg County (2016)



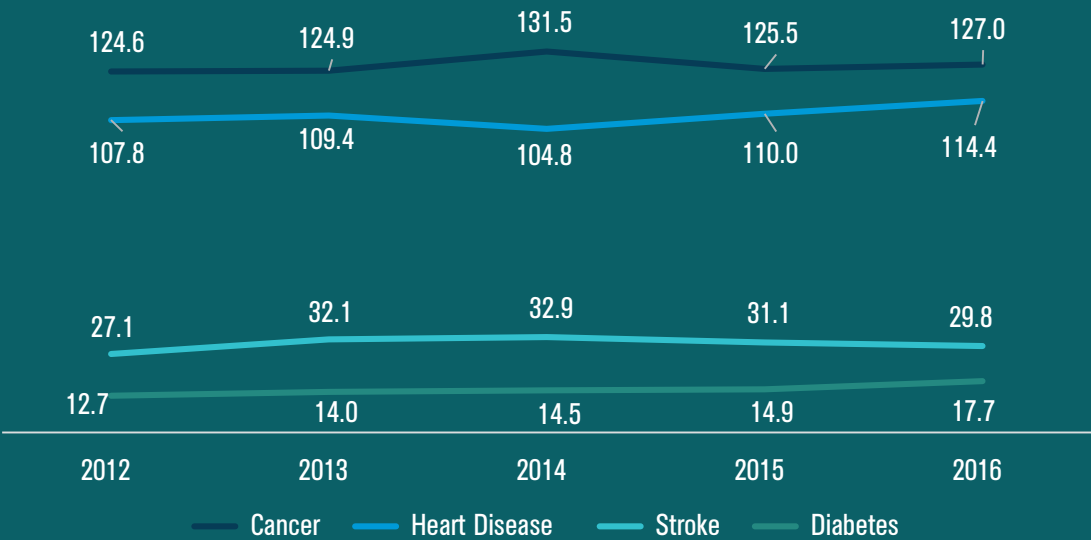
Sources: North Carolina Department of Health and Human Services (NC DHHS) Vital Statistics Reports and Mecklenburg County 2017-2018 Community Health Assessment Report

quality of life

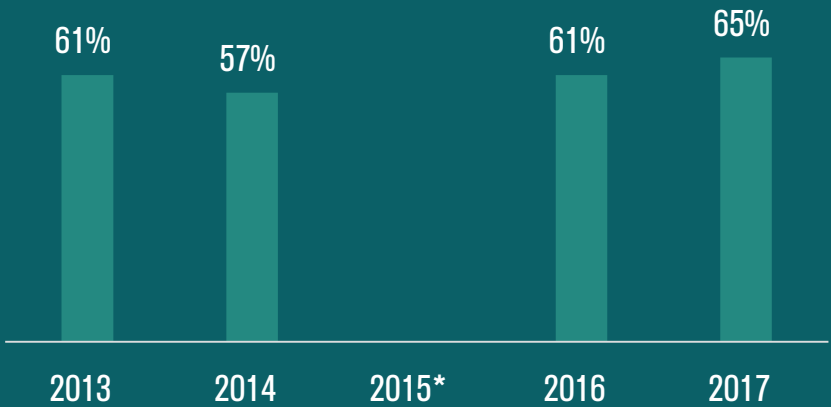
More than half of all deaths in Mecklenburg County are due to chronic conditions such as cancer, heart disease, stroke, and diabetes.

chronic disease in Mecklenburg County, NC

Mecklenburg County Chronic Disease Deaths per 100,000 Population



Percent Individuals Who Report Being Overweight/Obese



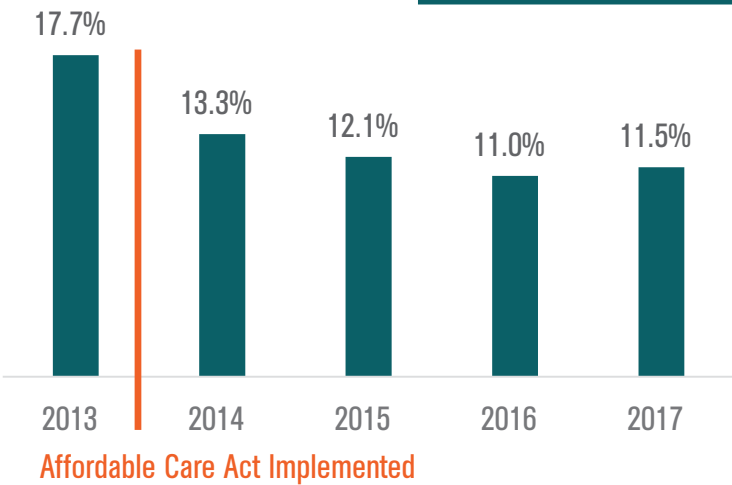
*Prior to 2015, the County relied on data from the State of North Carolina for its public health behavior results. After 2015, the County conducted a local Behavioral Risk Factor Surveillance Survey (BRFSS), which resulted in a change in methodology in 2015.

Sources: NC DHHS, Vital Statistics and Mecklenburg County Behavioral Risk Factor Surveillance Survey (BRFSS)

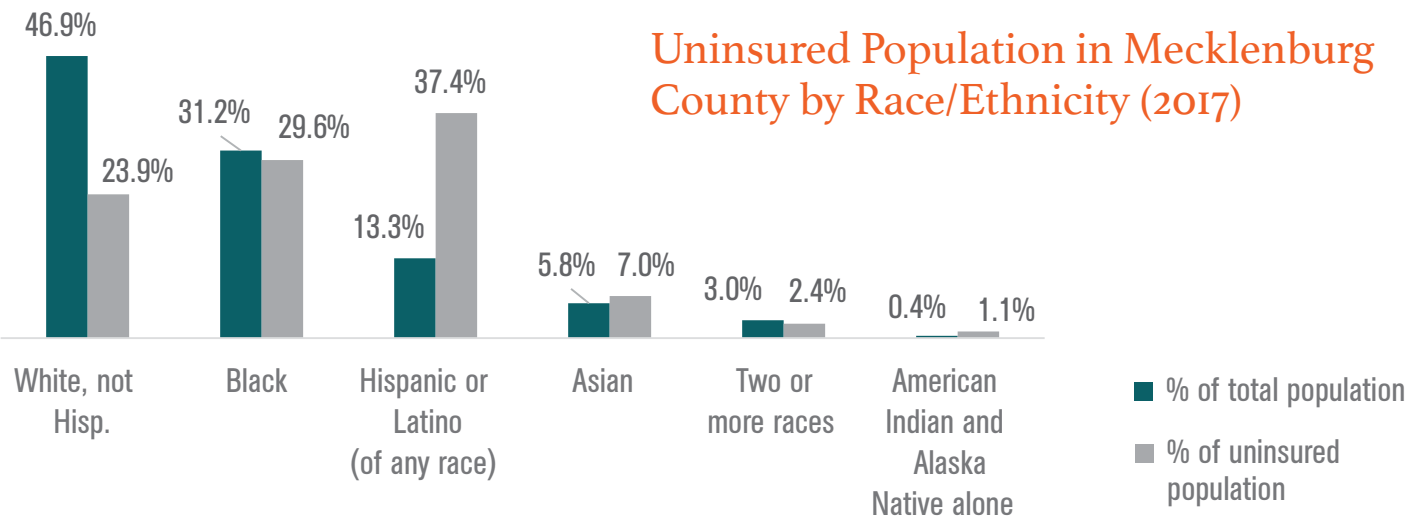


Percent of Mecklenburg County Population Uninsured

In 2017, 25% of Mecklenburg County's population received some form of public health insurance (including Medicare, Medicaid, and/or Veterans Affairs (VA) coverage). Approximately 15% of the County's population received Medicaid or some other means-tested public coverage.



Uninsured Population in Mecklenburg County by Race/Ethnicity (2017)

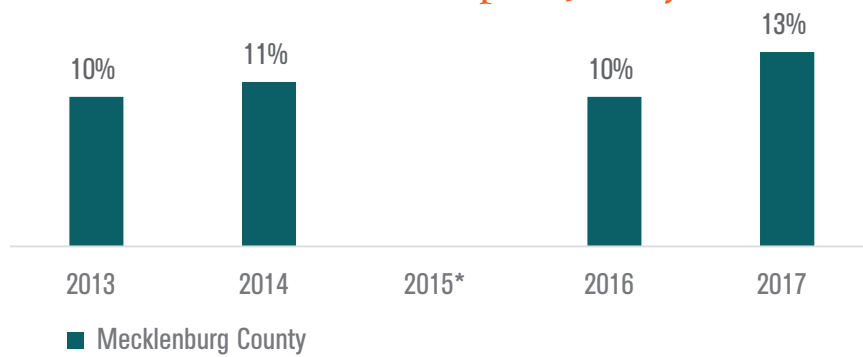


Sources: Census 2017 American Community Survey 1-year estimates

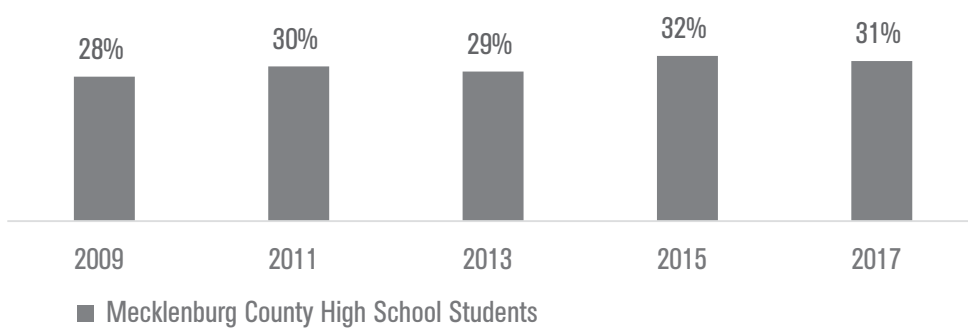
quality of life

mental health

Adults who reported poor mental health for at least 8 out of the past 30 days

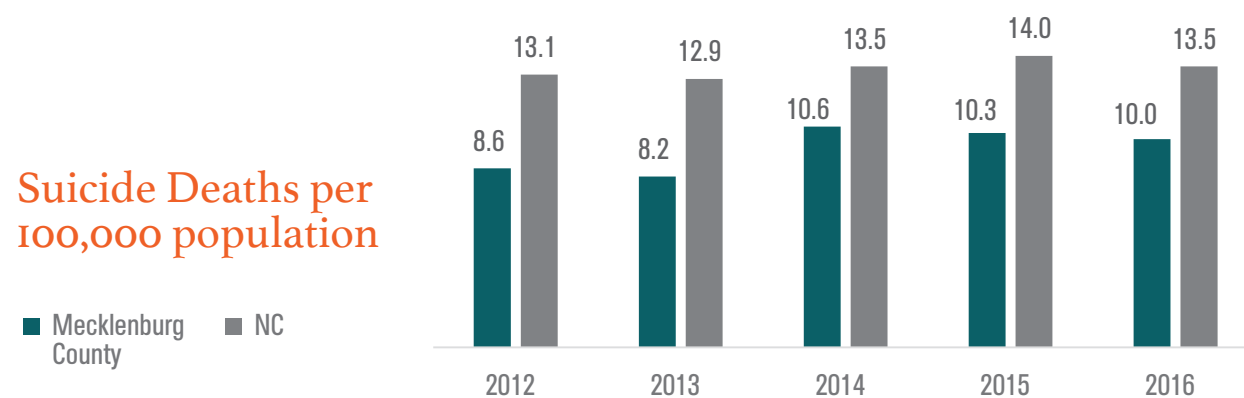


Charlotte-Mecklenburg High School Students who felt so sad or hopeless almost every day for two weeks or more in a row that they stopped doing some usual activities

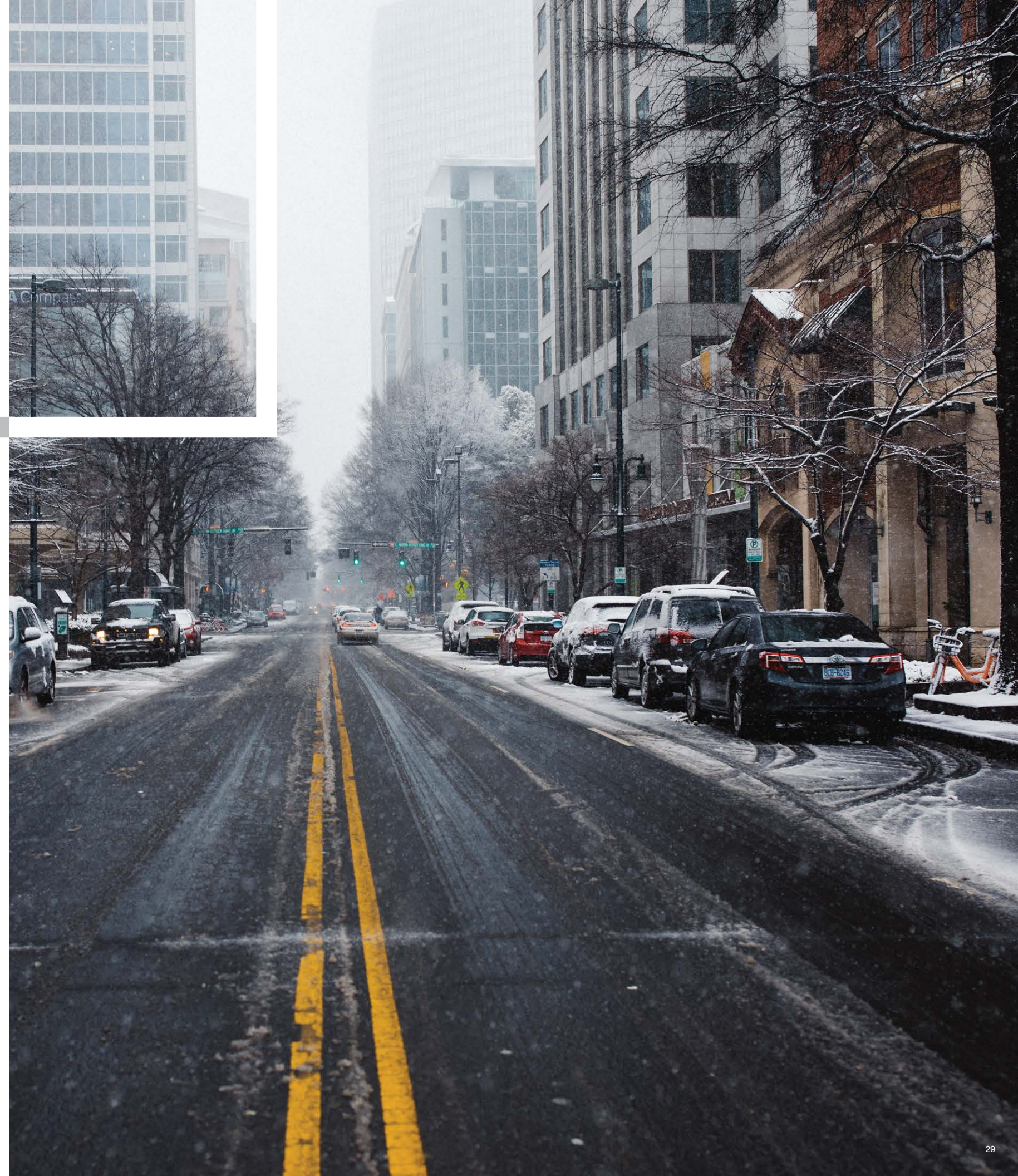


*Prior to 2015, the County relied on data from the State of North Carolina for its public health behavior results. After 2015, the County conducted a local Behavioral Risk Factor Surveillance Survey (BRFSS), which resulted in a change in methodology in 2015.

Suicide Deaths per 100,000 population



Sources: NC DHHS, Vital Statistics and Mecklenburg County Behavioral Risk Factor Surveillance Survey (BRFSS) and High School Youth Behavioral Risk Factor Survey (YRBS)



SUMMARY

National

97th consecutive month of job growth (as of November 2018)
7th consecutive year of 2+ million new jobs added (as of 2017)
Rising wages – income recovered to pre-recession levels

Local

Population growth, which didn't slow during the Great Recession, has continued and strengthened
Mecklenburg County and the City of Charlotte rank very high in national population growth
In recent years, the growth in the economy has caught up with the growth in the population
Over the next 30 years, there will be significant shifts in the percentages of demographic groups within the County
Over the last 10 years, job growth rate in the County was 25%
Continue to see positive increases in the percent of individuals with bachelor's degrees or higher educational degrees
Four-year cohort high school graduation rates are high; however, data may suggest a beginning decline in four-year cohort high school graduation rates

Local

For persons 25 and over and with a bachelor's degree or higher, disparities exist amongst some race/ethnic groups
Unemployment rates remain relatively high for non-degree holders, which was higher than the U.S. aggregate unemployment rate
Cost of living continues to increase in the County
Cancer and heart disease continue to be the leading causes of death in the County
Percent of individuals who are overweight/obese continues to increase
Percent of individuals reporting poor mental health days continues to increase
Blacks and Hispanics/Latinos are the largest populations of uninsured persons
Percent of persons with poor mental health days continues to rise, while the percent of deaths due to suicide remain relatively flat compared to prior years

PREPARED BY:
STRATEGIC PLANNING
& EVALUATION



2019

County Manager's Office
Strategic Planning & Evaluation



mecknc.gov



980.314.2900
600 East Fourth Street, 11th Floor
Charlotte, NC 28202

